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Foreign Crops and MARKETS



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Plan to Exchange Men and Farm Machinery May Help Solve 1946
Harvesting Problems in United States and Canada (Page 349)

United Kingdom Contracts for Australia's Exportable Raisin
Supplies for Next 3 Years (355)

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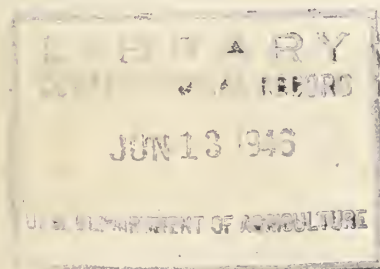
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L A T E N E W S

Feed rations in the United Kingdom will be sharply reduced for the October-April period in order to conserve protein and feed grain supplies. According to an official announcement the new ration will represent a cut of 40 percent from the ration in effect for dairy herds last winter. For small commercial pig and poultry holdings the ration will be 50 to 60 percent below that allowed for the past winter. Larger percentage reductions are scheduled for larger holdings. Rations are to apply to household pig and poultry holdings for the first time since feed rationing was adopted.

In the Ukraine rains relieved dry conditions west of the Dnieper River during the latter part of May. This is one of the Soviet Union's important winter wheat regions. The rains also had a good effect on crops in the eastern part of the middle Volga region, an important spring wheat area.

The 1945 cotton crop in Egypt, according to the final official estimate, is placed at 5,220,975 cantars (1,082,000 bales of 478 pounds), compared with 962,000 equivalent bales in 1944 and a prewar (1935-1939) average of 1,893,000 bales. The 1945 estimate includes 778,000 bales of cotton of more than 1-3/8 inch-staple length, 2,000 bales of 1-1/4 to 1-3/8 inches, 279,000 bales of 1-1/8 to 1-1/4 inches and 23,000 bales of scarto (ungraded cotton).

Argentine hog producers continue to liquidate herds because of high corn prices. Some frigorificos now estimate that hog marketings for the first half of 1946 will be 15 percent below the same period of 1945 and that receipts in the second half will be down from 60 to 70 percent. On this basis, slaughterings for the year would be about 1,850,000 head, or about 55 percent of the 1945 volume. In addition, it is expected that market weights will average from 10 to 15 percent under 1945.

Effective June 1 Switzerland reduced the basic bread ration from 250 to 225 grams per capita daily. It was claimed that the reduction was necessary in order to bridge the gap until new crop home-grown bread grains becomes available in the late fall. In addition, monthly rations of macaroni and similar cereal foods were reduced from 750 to 500 grams. The fat ration was reduced from 900 to 700 grams of which only 200 grams may be butter. Temporarily, however, the basic meat ration was increased from 1100 to 1250 grams. But the ration of cheese made from whole milk was reduced from 400 to 300 grams. At the same time, 200 grams of skim-milk cheese were made available to compensate for the reduction in whole-milk cheese.

C O M M O D I T Y D E V E L O P M E N T S

GRAINS, GRAIN PRODUCTS, AND FEEDSCANADA AND U. S. TO
EXCHANGE HARVESTERS

Exchange of grain harvesting machinery and crews between the prairie areas of Canada and the United States is provided for again in 1946 by the continuation of an agreement first entered into by the two Governments in 1942.

This wartime arrangement, which helped farmers in both countries solve their manpower and machinery problems, proved mutually advantageous, and the extension of the agreement to cover the 1946 harvest provides for only minor changes from previous years. The principal change is in the dates covering the time that harvesters may enter and remain in the bordering country..

Canada will permit harvesters to cross to the United States earlier than was provided for in the 1945 agreement, May 15 being the earliest date this year, compared with June 1 a year ago. September 1, the final date set for the return of Canadian workers, is also 2 weeks earlier than last year's limit. Harvesting units from the United States may remain in Canada until December 31.

NEW ZEALAND GRAIN
CROP GOALS SET HIGH

Production goals announced by the New Zealand Government for 1946-47 grain crops provide for wheat seedings of 250,000 to 300,000 acres, compared with 165,000 acres for the 1945-46 season.

Estimates of early fall seedings were reported to be disappointing, and the Government has been working with the Farmers' Federation to increase late fall seedings. Fall seeding is normally completed by early June. Reports indicate that an effort will be made to increase spring seedings also. Normally spring wheat acreage is not an important part of the total seeding.

The target of 50,000 acres for oats for threshing is about the same as the 1945 acreage and would provide for a small quantity in excess of the country's domestic needs. Acreage of barley and corn planned at 55,000 and 12,000 acres, respectively, would be substantially above normal levels. Feed-grain goals were set high in order to ensure adequate feed supplies without the use of wheat as feed.

EIRE RAISES FLOUR EXTRACTION RATE

Flour extraction in Eire represents 90 percent of the whole grain, after an increase of 5 percent in the extraction rate effective May 6. The change from 85 percent is the second increase during the present year, a shift to that rate from 80 percent having been made early in 1946.

With the extraction rate set at 90 percent, the deficit until next harvest is expected to be cut to 30,000 long tons, whereas it was estimated to be 40,000 long tons with the milling rate fixed at 85 percent.

The present rate of 90 percent contrasts with normal millings of 70 percent. During 1942 and 1943, however, extraction was at the rate of 100 percent. When reduced from that rate in November 1943, the mixture of barley with wheat in flour became compulsory.

ECUADOR'S RECORD RICE CROP TO BOOST EXPORTS

The exportable surplus of Ecuadoran rice available beginning in June may exceed 100 million pounds, in view of prospects for a record crop from the May-August harvest. These supplies compare with exports of 65 million pounds in 1945, when a small crop was produced.

ECUADOR: Rice exports by country,
January-February 1946, with comparisons

Country of Destination	Average :1939-41	: 1943	: 1944	: 1945 ^{a/}	January-February : 1945	: 1946
	: Million : pounds	: Million : pounds	: Million : pounds	: Million : pounds	: Million : pounds	: Million : pounds
Cuba	3	81	88	56	24	4
Peru	9	20	29	0	0	0
Venezuela	10	0	17	4	2	1
Colombia	6	b/	0	b/	1	0
Panama	3	b/	2	b/	0	0
Others	5	4	6	5	2	b/
Total	36	105	142	65	29	5
	:	:	:	:	:	:

Compiled from official sources

a/ Preliminary b/ Less than 500,000

The decree of April 3, 1946, superseded the law in effect in the past year which required authorization to export rice, and all rice may now be exported free except 60 million pounds, the amount earmarked for domestic needs. Consumption is estimated at 75 million pounds, the same as last year, with the remaining 15 million expected to come from stocks on hand.

FATS AND OILSCHILEAN FLAXSEED
CROP UP SHARPLY

Chilean flaxseed production, amounting to 151,000 bushels in 1945, was 10 percent larger than in the previous year and 300 percent more than the 5-year (1935-1939) average. The increase in recent years has been the result of Chile's efforts to become self-sufficient in vegetable oils.

While total area figures include acreage for fiber, the Provinces of Atocama, Coquimbo, Aconcagua, Santiago, Curico, and Cautin produce flax exclusively for seed. In some of these Provinces acreage has trebled since 1939, and the yield per acre is unusually high. Despite the increased flaxseed production, Chile still imports linseed oil and in some years small quantities of flaxseed. Argentina has usually been the chief source of supply.

CHILE: Flaxseed area, yield per acre, and production,
1945 with comparisons

Year	:	Area <u>a/</u>	:	Yield	:
	:		:	per acre	:
	:		:		Production
	:		:		1,000
	:	<u>Acres</u>	:	<u>Bushels</u>	<u>bushels</u>
	:		:		
Average 1935-1939	:	4,600	:	8.1	37.5
1943	:	12,800	:	10.9	138.5
1944	:	b/ 14,600	:	9.4	137.2
1945	:	12,100	:	12.5	151.0

Official sources.

a/ Acreage includes area for fiber. b/ Revised.

ARGENTINE SUNFLOWER
CROP AT NEAR RECORD

Argentine sunflower-seed production for 1945-46 amounts to 2,208 million pounds, according to the second official estimate. This is the second largest crop ever harvested, being only 3 percent smaller than the record output of 1943-44. Favorable marketing prospects encouraged producers to plant (October 1945) the largest acreage ever reported.

The Provinces of Buenos Aires, Cordoba, and Santa Fe are, in the order mentioned, the principal zones of production, accounting for approximately 95 percent of the total output.

A decree of May 23 fixed the Government-purchase price of all available supplies of sunflower seed at 28 pesos per 100 kilograms (\$3.78

per 100 pounds, United States currency) and sunflower-seed oil at 1.21 pesos per kilogram (16.34 cents per pound).

ARGENTINA: Sunflower-seed acreage, yield per acre, and production, 1945-46 with comparisons

Year	Area		Yield per harvested: acre	Production
	Sown	Harvested		
	: 1,000 acres	: 1,000 acres	: Pounds	: 1,000 pounds
1941-42	1,853	1,678	880	1,477,082
1942-43	1,665	1,256	736	924,168
1943-44	3,888	3,109	735	2,283,966
1944-45	3,686	2,800	776	2,171,751
1945-46	4,003	-	-	2,208,127

Compiled from official sources.

INDIA SUSPENDS PEANUT
AND FLAXSEED EXPORTS

In view of the critical food situation which requires conservation for domestic use of all available foodstuffs, Indian peanut and flaxseed exports have been suspended, according to an announcement from the Indian Government. Peanuts are an important item in the Indian diet, and while linseed oil is utilized principally for industrial purposes, it is also consumed as an edible product.

India is the world's largest exporter of peanuts and ranks second in flaxseed exports, normally accounting for approximately 40 and 12 percent, respectively, of world total shipments.

TOBACCO

SWISS USE MORE
DOMESTIC TOBACCO

During the war when Switzerland's tobacco manufacturers were unable to obtain supplies of leaf adequate to meet increasing consumption requirements, the Government, in order to avoid rationing, was forced to encourage expansion in domestic leaf production. From 1941 through 1945, Swiss tobacco production averaged about 4.4 million pounds annually, or double the 5-year (1935-1939) average production of 2.2 million.

Most of the tobacco produced in Switzerland consists of dark air-cured types used in the manufacture of cigarettes and pipe mixtures. The leaf was formerly of low quality, but the Government in recent years has encouraged the cultivation of types best suited to the Swiss soil and climate. Domestic supplies of leaf are sufficient to cover about 15-20 percent of the country's total requirements.

Numerous types of leaf are imported for blending with domestic leaf in the manufacture of tobacco products. Shipping difficulties during the war to some extent restricted imports from overseas, particularly from the United States. High prices for United States leaf, in comparison with those paid for other types of imported leaf, also adversely affected takings from this country. During 1935-1939, imports of leaf from all sources averaged about 15.8 million pounds annually, and about 39 percent of the total was of United States origin. Most of the imports from the United States consisted of Maryland leaf for use in cigarette manufacture, and Kentucky-Tennessee fire-cured for production of cigars.

SWITZERLAND: Imports of leaf tobacco by countries of origin,
average 1935-1939, annual 1940-1944

Country of origin	:Average : : 1935- : : 1939 :	: 1940 :	: 1941 :	: 1942 :	: 1943 :	: 1944 :
	: 1,000 : : pounds :	: 1,000 : : pounds :	: 1,000 : : pounds :	: 1,000 : : pounds :	: 1,000 : : pounds :	: 1,000 : : pounds :
United States	6,203:	6,960:	6,925:	5,524:	5,882:	4,530
Brazil	2,491:	3,132:	3,531:	3,268:	3,391:	3,469
Netherlands Indies ...	2,451:	2,312:	2,005:	1,450:	1,171:	1,000
Italy a/	688:	1,602:	2,210:	3,076:	2,375:	1,547
Turkey	340:	462:	1,043:	1,108:	1,396:	1,677
Greece	970:	1,036:	1,132:	1,231:	847:	633
Bulgaria	403:	249:	316:	435:	475:	717
Dominican Republic ...	413:	813:	943:	896:	1,027:	735
Others b/	1,836:	980:	934:	772:	918:	717
Total	15,795:	17,546:	19,039:	17,760:	17,482:	15,025

Source: Official sources

a/ Additional imports from Italy of tobacco for nicotine purposes averaged 1.3 million pounds during the years 1940-1943.

b/ Chiefly Argentina, Paraguay, Hungary, and Cuba.

Imports from all sources during 1940-1944 increased to an average of 17.4 million pounds, but the United States share declined to about 34 percent. Swiss manufacturers were able to obtain leaf more easily from Balkan countries--Turkey, Greece and Bulgaria--and from Italy. In contrast to the United States' position in the Swiss market, the share of these four countries increased from 15 percent during 1935-1939 to 27 percent in 1940-1944. Imports from Brazil and the Dominican Republic also showed a notable increase during the war years.

Factory output of cigarettes showed a steady rise during the war. In 1944, about 3.5 billion cigarettes were produced, compared with an output of 2.4 billion in 1939. The greatest increase occurred in the cigarettes composed of from 50 to 100 percent domestic leaf. The bulk of Switzerland cigarettes are manufactured from domestic leaf, oriental leaf, Italian fire-cured, and Maryland leaf. Straight oriental cigarettes

are currently the most popular, followed by Virginia, American blended, Maryland, and dark domestic. The demand for United States cigarettes was in excess of available supplies during the war years. To meet the demand, Swiss manufacturers marketed several brands of blended cigarettes similar to those of United States manufacture.

Production of cigars varied considerably during the war years. About 565 million were manufactured in 1944, compared with an average output of 556 million during 1939-1943. Production of smoking tobacco amounted to 3.5 million pounds in 1944, well below the prewar average output of this product. Production of plug and twist tobacco amounted to about 176,000 pounds annually. Only insignificant quantities of chewing tobacco and snuff were manufactured.

COTTON AND OTHER FIBERS

WEEKLY COTTON PRICES ON FOREIGN MARKETS

COTTON: Spot prices of certain foreign growths
and qualities in specified markets

Market, location, kind, and quality	Date : 1946	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
Alexandria,	:	Kantar	:	:	:
Ashmouni, F.G.F.	5-30	99.05 lbs.	Tallari	31.75	26.51
Giza 7.	5-30	99.05 lbs.	Tallari	Not quoted	
Karnak	5-30	99.05 lbs.	Tallari	36.00	30.06
Bombay	:	:	Candy	:	:
Jarila, fine	5-30	784 lbs.	Rupee	435.00	16.75
Kampala, East African:	5-30	784 lbs.	Rupee	850.00	32.72
Buenos Aires	:	Metric ton	:	:	:
Type B.	6-1	2204.6 lbs.	Peso	1,860.00	25.12
Lima	:	Sp. quintal	:	:	:
Tanguis, Type 5	6-1	101.4 lbs.	Sol	136.00	20.63
Recife	:	Arroba	:	:	:
Mata, Type 5	5-31	33.07 lbs.	Cruzeiro	95.00	15.41
Sertao, Type 5	5-31	33.07 lbs.	Cruzeiro	102.00	16.55
Sao Paulo	:	Arroba	:	:	:
Sao Paulo, Type 5 ...	:	33.07 lbs.	Cruzeiro	:	:
Torreón	:	Sp. quintal	:	:	:
Middling, 15/16"	5-31	101.4 lbs.	Peso	106.25	21.55

Compiled from weekly cables from representatives abroad.

NEAR-RECORD FLAX FIBER CROP IN CHILE

Chilean flax fiber production in 1945-46 is 17 percent less than the record crop last season, according to the final estimate by Chile's Ministry of Agriculture. About 3 million pounds of fiber were obtained

from about 12,100 acres of flax, compared with about 3.6 million from 14,600 acres in 1944-45 and 2.8 million from 12,800 acres in 1943-44.

CHILE: Flax acreage and fiber production
1945-46 with comparisons

Year	Area :(for fiber and seed)	Fiber : production	Average yield : per acre
	<u>Acres</u>	<u>Pounds</u>	<u>Pounds</u>
1938-39	1,900	545,000	294
1943-44	12,800	2,783,000	214
1944-45	14,600	3,625,000	250
1945-46	12,100	3,008,000	250

Compiled from official sources.

Production of flax increased rapidly during the war years. Although less than 550,000 pounds each of fiber and tow were produced in 1938-39 from a total flax area of less than 1,900 acres, an increase of approximately 600 acres was recorded in the next year and about 1,200 acres in each of the 2 following years. In 3 years, acreage showed an increase of more than 3,000 acres or about 167 percent.

CHILE: Distribution of total flax area and fiber production
by Zones and Provinces, 1943-44

Zones and Provinces	Area :	Percentage : of total	Fiber : production	Percentage : of total
	<u>Acres</u>	<u>Percent</u>	<u>Pounds</u>	<u>Percent</u>
Northern Zone				
(Includes Atacama and				
Coquimbo Provinces a/)	940	7.4	-	-
North Central Zone				
(Aconcagua, Valparaiso,				
Santiago, O'Higgins, Col- ...				
chagua, Curico, Talca	3,430	26.9	892,000	32.1
South Central Zone				
(Linares Province)	1,320	10.3	165,000	5.9
Southern Zone				
(Malleco, Cautin, Val-				
divia, Osorno, and				
Llanquihue a/)	7,070	55.4	1,726,000	62.0
Total, all Chile	12,760	100.0	2,783,000	100.0

Compiled from official sources.

a/ Flax is not grown in commercial quantities north of Atacama Province nor south of Llanquihue Province.

From the 4,900 acres reported in 1941-42 a decrease of about 1,700 acres was recorded in 1942-43. The set-back lasted only 1 year, however, and was more than compensated for in the increase of 9,500 acres and 1,900 acres, respectively, during the following 2 years. The peak acreage of 14,600 acres was reached in 1944-45.

Flax in the northern Provinces is harvested mostly for seed and in the southern Provinces largely for fiber. The central Provinces yield both seed and fiber. The accompanying table shows the distribution of the total flax area and of fiber output for the crop year 1943-44, the last year for which revised data are available by Zones and Provinces.

FRUITS, VEGETABLES, AND NUTS

SOUTHERN HEMISPHERE RAISIN PRODUCTION BELOW AVERAGE 1/

The 1946 preliminary estimate of raisin production in the four leading commercial producing countries in the Southern Hemisphere is 86,700 short tons, compared with 72,800 tons (revised) in 1945 and 107,400 tons in 1944. This estimate is 12 percent below the 5-year (1940-1944) average of 98,300 tons and 1 percent below the 10-year (1935-1944) average of 87,400 tons. Australia recorded the largest increase in production over the previous year. Argentina and the Union of South Africa reported modest gains, but Chile showed a small decline.

RAISINS: Estimated commercial production in specified countries
(revised), 1946 with comparisons
(Rounded to nearest 100 short tons)

Year	: Argentina :	Australia :	Chile :	: Union of :	Total
	: Short :	Short :	Short :	: Short :	Short
Average -	: tons :	tons :	tons :	: tons :	tons
1935-1944	: 5,100 :	69,600 :	1,900 :	: 10,800 :	87,400
1940-1944	: 5,700 :	79,000 :	1,900 :	: 11,700 :	98,300
1944	: 7,100 :	87,200 :	900 :	: 12,200 :	107,400
1945 a/	: 3,600 :	56,500 :	900 :	: 11,800 :	72,800
1946 a/	: 4,100 :	69,500 :	700 :	: 12,400 :	86,700

Compiled from trade and official sources.

a/ Preliminary estimate.

The 1946 growing season in Australia and South Africa was favorable, although isolated areas reported some damage. In Australia, losses sustained from a late season rain have yet to be ascertained. In South American countries the weather was less favorable with output in Chile indicated as smaller than in the preceding year and considerably below average.

1/ A more extensive statement on this subject is available upon request to the Division of Foreign Information and Statistics, Office of Foreign Agricultural Relations.

At the beginning of the current marketing season, the 1945 output was practically all sold before new crop raisins appeared on the market this spring. Exports were made from British countries to the United Kingdom, Canada, New Zealand, and other Empire destinations. Argentina and Chile for the most part supplied limited quantities to neighboring countries, but a few small parcels from Argentina are believed to have reached certain European markets.

The export outlook for this year will be little changed from that for the previous crop. Australia has contracted to export its entire exportable surplus for the next three crops to the United Kingdom. South African surpluses will no doubt find their way to the United Kingdom and a few small parcels will go to other nearby British Colonies. Argentina has limited its export licenses of raisins, and Chile, with a smaller output, will have little surplus available for export to other South American countries. In view of these developments in the Southern Hemisphere, there may be a very limited export possibility for California raisins in South American countries such as Peru, Ecuador, and Brazil.

W. R. Schreiber

LIVESTOCK AND ANIMAL PRODUCTS

CANADIAN HOG SLAUGHTER CONTINUES TO DECREASE

Inspected hog slaughter in Canada from January 1 to May 18, continued its downward trend, with a total slaughter of 1,935,000 head, compared with 2,774,000 for a corresponding period in 1945. Although weekly slaughter is more evenly distributed, this is a decrease of 30 percent over a year ago. Canadian officials expect to attain an inspected slaughter of 5.2 million head in 1946.

The combined fall and spring pig crop for 1945-46 is estimated at about 15 percent less than a year ago. This is due to the 19-percent drop in the 1945 fall pig crop over a year ago, and the indicated reduction of 9 percent in the number of sows farrowing during the December 1945 to May 1946 period.

The December 1945 estimate of 5.8 million hogs on farms, which compared with 7.6 million a year earlier, indicates that the downward trend in hog production in Canada may continue through 1946. The decline in eastern Canada and the Maritime Provinces was smaller than in western Canada. Decreases in eastern Canada ranged from 6 percent in Ontario to 16 percent in New Brunswick. Among western Provinces decreases varied from 42 percent in Saskatchewan to 28 percent in British Columbia.

Prices at principal hog markets in Canada during April were \$1.30 to \$1.40 per hundredweight higher than for March of this year and for

April of last year. This price increase resulted largely from a rise of \$2.50 per 100 pounds in the contract with the United Kingdom for Grade "A" Wiltshires. The higher price resulted in a more favorable hog-barley price ratio. An increase in grain prices, however, might tend to affect the advantage gained from the favorable price of bacon.

SWISS WOOL PRICE SUPPORTS ANNOUNCED

The Swiss Government has now guaranteed domestic wool producers 32 cents more per pound (3.00 francs more per kilogram) than the price paid for imported wool in order to encourage domestic production. This action has been taken now that foreign wools may be freely imported in competition with domestic wool. The Government is to pay one-half of the subsidy in 1946, 40 percent in 1947, and one-third from 1948 onward, with the balance being paid by processing mills.

Wool mills working on Government contracts for uniforms will be obliged to buy a certain percentage of the domestic wool clip. This subsidy will cost the Government 375,000 francs in 1946 (1-franc=23.4 United States cents), 260,000 in 1947, and 200,000 thereafter.

The wool clip of Switzerland is estimated at approximately 551,000 pounds annually, and domestic consumption averaged 18 million pounds in the 5 years 1934-1938. Sheep numbers in Switzerland are relatively small, amounting to only 192,000 in 1945, or slightly above the 5-year (1936-1940) average. Sheep breeding, concentrated largely in the mountain regions, often represents the small mountain farmer's main livelihood.

MISCELLANEOUS

TRADE CONTROLS

France and Denmark have concluded in May a commercial agreement in effect for 1 year providing for Danish exports to France of such products as butter, meat, cattle on the hoof, horses, condensed milk, and seed potatoes and French exports to Denmark of wines, spirits, potash, and certain industrial products.

Mexico has exempted certain foodstuffs of prime necessity from import duties. Private importers are now permitted to place orders with the National Distribuidora y Reguladora (National Distributing and Regulating Company) which, by accepting or rejecting the orders, controls the duty-free imports. The Distribuidora will continue to be the sole importer of wheat and wheat flour.

